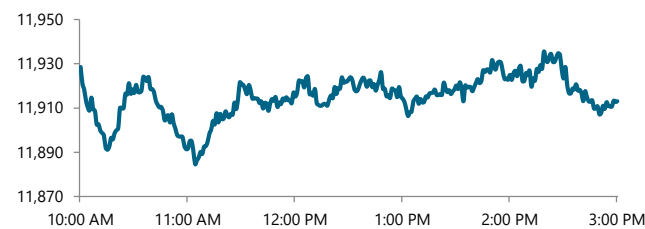


Daily Markets Overview

15 November 2021

TASI Intraday



Source: Reuters

Saudi Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Saudi (TASI)	11,913	0.1	0.1	37.1	26.3
Saudi (NOMUC)	24,672	-0.4	-0.4	-6.0	13.7
Energy	5,844	-0.3	-0.3	8.5	23.9
Materials	7,878	0.8	0.8	37.1	19.6
Capital Goods	7,815	1.7	1.7	19.5	19.1
Com. & Prof. Svc	4,631	-0.8	-0.8	14.1	NA
Transportation	5,664	1.1	1.1	17.0	NA
Cons. Durables & Apparel	7,084	0.6	0.6	23.8	NA
Consumer Services	5,149	-0.2	-0.2	20.6	NA
Media	19,358	0.1	0.1	89.5	35.9
Retailing	10,306	0.2	0.2	20.4	32.1
Food & Staples Retailing	9,817	0.1	0.1	-6.8	41.7
Food & Beverages	5,224	0.3	0.3	-4.4	44.7
Health Care Equipment	7,496	0.0	0.0	32.6	39.2
Pharma, Biotech & Life Science	5,231	0.8	0.8	1.1	NA
Banks	12,910	-0.1	-0.1	70.1	23.2
Diversified Financials	7,281	1.8	1.8	58.5	NA
Insurance	6,424	-0.1	-0.1	6.6	NA
Telecommunication	7,400	0.7	0.7	7.3	22.3
Utilities	6,120	0.5	0.5	32.8	12.7
REITs	4,883	0.0	0.0	13.9	39.0
Real Estate	3,355	-0.7	-0.7	11.1	NA

Sources: Bloomberg, Reuters, Tadawul

Top 5 Gainers

Company	Last Close	% Change	Value (SAR mn)
Tabuk Cement Co.	19.70	8.0%	29
Arabian Pipes Co.	17.32	8.0%	39
The National Company for Glass Industries	38.15	5.5%	40
Saudia Dairy and Foodstuff Co.	175.00	4.8%	23
Saudi Advanced Industries Co.	53.10	4.5%	264

Source: Tadawul

Upcoming General Assembly Meetings

Company	Date
Bank Aljazira	15-Nov-21
Saudia Dairy and Foodstuff Co.	15-Nov-21
Al Alamiya for Cooperative Insurance Co.	16-Nov-21
Anaam International Holding Group	22-Nov-21
National Metal Manufacturing and Casting Co.	23-Nov-21
Saudi Indian Company for Cooperative Insurance	23-Nov-21

Source: Tadawul

Saudi Market Update

- TASI closed 0.1% higher at 11,913 while NOMUC declined 0.4% to 24,672 on Sunday. TASI traded value totaled SAR 4.4bn and averaged SAR 6.3bn over the last 30 days. The five most active stocks (by value) in TASI accounted for 26.9% of the daily traded value.
- MSCI Emerging Markets was closed for trading on Sunday.
- Banks closed 0.1% lower, while Materials ended 0.8% higher. Telecom gained 0.7%. Diversified Financials (up 1.8%) was the best performing sector. Among stocks, Tabuk Cement Co. (3090/TACCO AB), Arabian Pipes Co. (2200/APCO AB), and The National Company for Glass Industries (2150/ZOUJAJ AB), led the gainers.
- Ministry of Commerce issued 35 licenses for exporting steel and cement since the beginning of 2021, compared to 21 licenses last year. The ministry issued 12 licenses for exporting cement and another 23 licenses for exporting steel year-to-date (YTD), while three other licensing requests are still under review. (Source: Argam)
- According to the General Authority for Statistics (GASTAT), KSA's merchandize imports rose by 24% Y/Y in August to SAR 50.3bn (USD 13.41bn). Imports increased by SAR 3.1bn (USD 826.53mn), or 7% in August, compared to July. (Source: Argam)
- Middle East Healthcare Co. (4009/MEH AB) announced the latest developments regarding the company's projects in Makkah, Riyadh and Dammam. The company revealed that completion rate of the Makkah Hospital stood at 85%, while the staff housing in Makkah and Dammam were 90% and 82% complete, respectively. The company expects the Makkah Hospital to be completed by April 30, 2022, and the Dammam and Makkah staff housing projects to be finished by December 31, 2021. The Medical Tower and Inpatient Beds Expansion project at the Saudi German Hospital Riyadh is 70% complete, with expected completion date by March 31, 2022. (Source: Argam)
- Abdullah Al Othaim Markets Co. (4001/AOTHAIM AB)'s Vice Chairman expects the KSA retail sector to grow by 3% in 2022. He added that the impact of global supply chain crisis is limited to some food commodities until now, affirming that the company's supplies are uninterrupted, and branches are operating normally. (Source: Argam)

Top 5 Losers

Company	Last Close	% Change	Value (SAR mn)
Arabian Centres Co	22.36	-10.0%	12
Sadr Logistics Co.	414.00	-7.6%	116
Saudi Paper Manufacturing Co.	51.40	-3.2%	25
Herfy Food Services Co.	69.60	-3.1%	26
Amana Cooperative Insurance Co.	36.50	-2.7%	10

Most Active Stocks by Value (SAR mn)

Company	Last Close	% Change	Value (SAR mn)
Al Rajhi Bank	148.80	-0.1%	300
Saudi Advanced Industries Co.	53.10	4.5%	264
SABIC Agri-Nutrients Co.	183.00	-0.3%	263
The Saudi National Bank	69.00	-1.4%	182
Alinma Bank	25.80	1.6%	173

Source: Tadawul

NOTES: (1) Prices as of last trade. Updated as of November 14, 2021

(2) WTD: Week to Date and YTD: Year to Date

Daily Markets Overview

15 November 2021

GCC Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Dubai (DFM)	3,170	0.9	0.9	27.2	19.3
Abu Dhabi (ADX)	8,296	0.1	0.1	64.4	21.9
Kuwait (KSE)	7,300	-0.8	-0.8	35.9	48.6
Qatar (QE)	11,965	-0.6	-0.6	14.7	16.7
Oman (MSM)	4,001	-0.3	-0.3	9.4	11.3
Bahrain (BSE)	1,784	-0.3	-0.3	19.7	10.0
DJMENA Index	770	0.0	0.0	32.5	NA

Source: Bloomberg, Reuters

Global Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
US (S&P 500)	4,683	0.7	-0.3	24.7	25.8
US (NASDAQ 100)	15,861	1.0	-0.7	23.1	28.9
UK (FTSE 100)	7,348	-0.5	0.6	13.7	18.0
Germany (DAX)	16,094	0.1	0.2	17.3	15.9
France (CAC 40)	7,091	0.5	0.7	27.7	21.4
Russia (MICEX)	4,122	-1.6	-1.3	25.3	8.2
Japan (Nikkei)	29,610	1.1	0.0	7.9	17.0
Hong Kong (HSI)	25,328	0.3	1.8	-7.0	10.2
South Korea (KOSPI)	2,969	1.5	0.0	3.3	14.0
China (SHCOMP)	3,539	0.2	1.4	1.9	15.0
India (NIFTY)	18,103	1.3	1.0	29.5	26.4
Brazil (IBOV)	106,335	-1.2	1.4	-10.7	7.2
Turkey (BIST 100)	1,639	0.8	3.5	11.0	6.8
Egypt (EGX30)	11,573	0.0	-0.3	6.7	9.6
MSCI Emerging Markets	1,285	0.3	1.7	-0.4	14.7
MSCI World	3,224	0.7	-0.3	19.8	23.1

Source: Bloomberg, Reuters

Commodities Prices

Index	Last Close	1 Day %	WTD %	YTD %	1 Year %
Brent Crude (\$/bbl)	82.2	-0.8	-0.3	58.6	88.8
Natural Gas (\$/mmbtu)	4.8	-7.0	-13.9	88.7	51.2
Gold (\$/oz)	1,865	0.1	6.1	-1.8	-0.6
Silver (\$/oz)	25.3	0.2	11.6	-4.1	4.3
Platinum (\$/oz)	1,086	-0.3	5.6	1.3	22.9
Copper (\$/t)	9,841	0.3	4.8	27.0	42.3
Zinc (\$/t)	3,277	-0.5	4.2	20.1	25.6
Lead (\$/mt)	2,392	0.3	6.1	21.3	28.0
Wheat (\$/bu)	829	0.5	12.9	29.4	34.8
Corn (\$/bu)	585	1.2	10.3	20.9	43.5
Sugar (\$/lb)	20.0	-0.5	-1.4	29.2	46.7

Source: Bloomberg

Interest Rate Watch (3M Interbank Offer Rate, %)

Country	Last Close	1 Day Change	YTD Change	Spread*
US	0.16	0.00	-0.08	0.00
Saudi Arabia	0.84	0.00	0.02	0.68
UAE	0.34	0.04	-0.18	0.18
Kuwait	1.50	0.00	0.06	1.35
Qatar	1.16	-0.01	0.03	1.00
Bahrain	1.52	0.00	-0.73	1.36

Source: Reuters

NOTES:

(1) Prices updated as of November 12, 2021 (2) WTD: Week to Date; YTD: Year to Date; NA: Not Applicable, *Spread = US 3M Rate – Country 3M Rate

GCC & Global Markets Update

- Global markets were closed for trading on Sunday.
- Asian markets are trading mixed on Monday. China is down 0.3%, while Japan and South Korea are up 0.4% and 1.0%, respectively. Hong Kong is trading 0.1% lower, while India is trading 0.4% higher in the morning session.
- GCC markets ended mixed on Sunday. Dubai and Abu Dhabi gained 0.9% and 0.1%, respectively. Kuwait and Qatar decreased 0.8% and 0.6%, respectively. Both Oman and Bahrain closed 0.3% lower.
- The League of Arab States announced that it is in the process of preparing a study and a roadmap for evaluating the potential of green hydrogen in the energy supply chain by 2050. It added that the German government will be helping the League of Arab States in drawing up the roadmap. (Source: Zawya)
- The Central Bank of the UAE announced that it will publish a new index for actual overnight funding transactions denominated in UAE Dirham from 7th December 2021, named "DONIA" – Dirham Overnight Index Average, as part of the new Dirham Monetary Framework implementation plan. (Source: Zawya)
- Dubai Airports announced that it handled 20.7mn passengers in the first 10 months of the year, half of which passed through the major Gulf transit hub between July and October. It now expects to record 28.7mn passengers this year, up from its most recent forecast of between 26 and 27mn. (Source: Zawya)
- Oman Tourism Development Company (Omran Group), with a vision to transform the tourism and real estate sector in the country in accordance with Oman Vision 2040, has revealed the masterplan and brand identity of 'Yiti' - one of the largest integrated tourism developments in Oman. (Source: Trade Arabia)
- Japan's industrial production for September (prior: -3.6% M/M, +8.8% Y/Y; consensus: -5.4%) will be announced today. (Source: Trading Economics)
- US EIA Petroleum status report on weekly change in crude oil inventories for the week ended November 12 (prior: +1.0mn barrels) will be announced on November 17. (Source: Trading Economics)
- US jobless claims for the week ended November 13 (prior: 267K) will be announced on November 18. (Source: Trading Economics)

Daily Markets Overview

15 November 2021

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Saudi Fransi Capital (Closed Joint Stock Company Owned by Banque Saudi Fransi)

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